



# FILE ATTACHMENT WALKTHROUGH FOR SERVICEPOINT v.4.06.048

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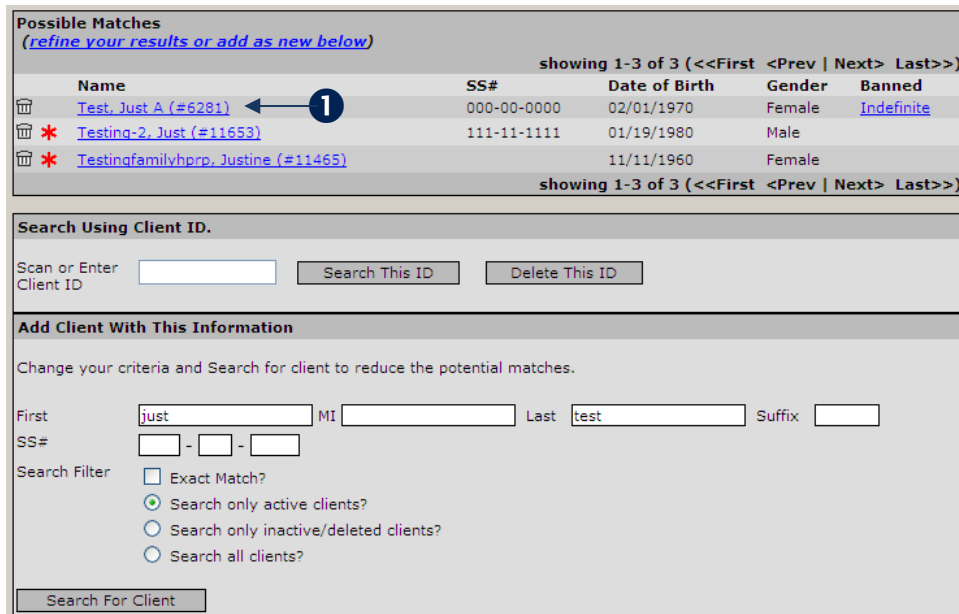
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## SERVICEPOINT WORKFLOW

Bowman Systems recommends the following workflow in order add, edit, and delete file attachments into our ServicePoint database. This workflow was completed using an Internet Explorer web browser, version 7 on Windows XP Service Pack 3 operating system. There may be add-ons or security settings within your internet options that will prevent the options seen in this workflow. If you're having difficulty with these options, see your system administrator or technical support office for assistance.

### CLIENT ARRIVAL

- Click on **ClientPoint**.
- Search the database for possible matches. If the client already has an existing record in **ServicePoint**, click on the client's name (a blue hyperlink) to access the record. If the search results yield no adequate matches, add the client as new. (See Figure 1-1 ①)



**Possible Matches**  
([refine your results or add as new below](#))

showing 1-3 of 3 (<<First <Prev | Next> Last>>)

Name	SS#	Date of Birth	Gender	Banned
<a href="#">Test, Just A (#6281)</a> ①	000-00-0000	02/01/1970	Female	<a href="#">Indefinite</a>
* <a href="#">Testing-2, Just (#11653)</a>	111-11-1111	01/19/1980	Male	
* <a href="#">Testingfamilyhprp, Justine (#11465)</a>		11/11/1960	Female	

showing 1-3 of 3 (<<First <Prev | Next> Last>>)

**Search Using Client ID.**

Scan or Enter Client ID:

**Add Client With This Information**

Change your criteria and Search for client to reduce the potential matches.

First:  MI:  Last:  Suffix:

SS#:  -  -

Search Filter:

☐ Exact Match?

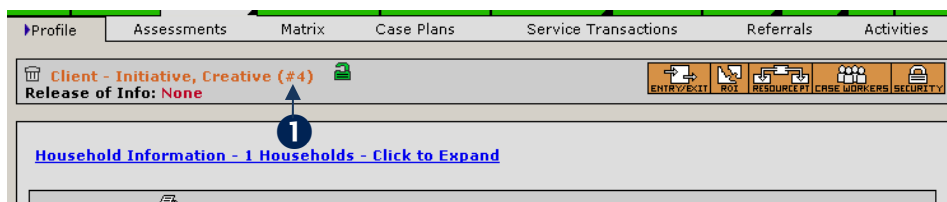
☒ Search only active clients?

☐ Search only inactive/deleted clients?

☐ Search all clients?

Figure 1-1

- The **Profile** tab of the **Client's** record will load and the **Client ID** will display (#). (See Figure 1-2 ①)



Profile | Assessments | Matrix | Case Plans | Service Transactions | Referrals | Activities

Client - Initiative, Creative (#4)  
Release of Info: None

①

[Household Information - 1 Households - Click to Expand](#)

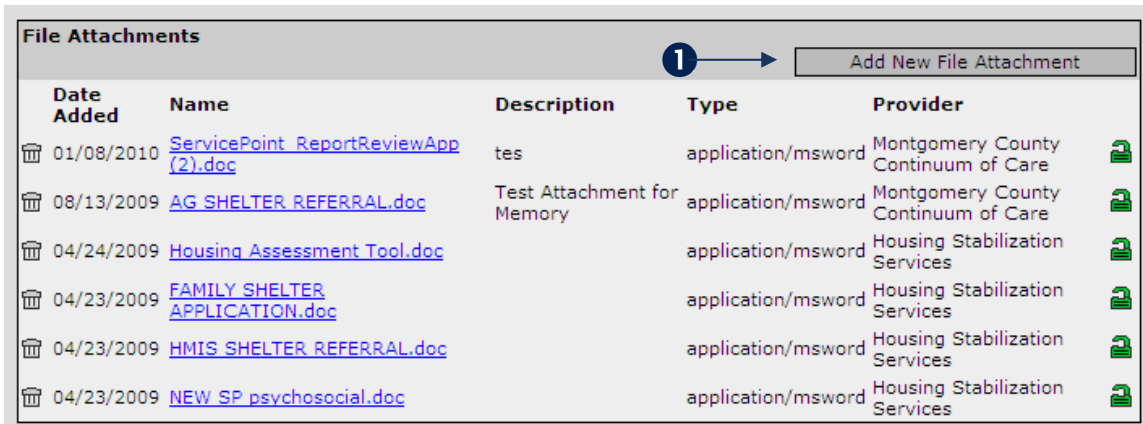
Figure 1-2

### IMPORTANT

If “Don’t Know” or “Refused” are selected as the Housing Status response, **the client will not be reported** in the HPRP reports.

## ADDING ATTACHMENTS

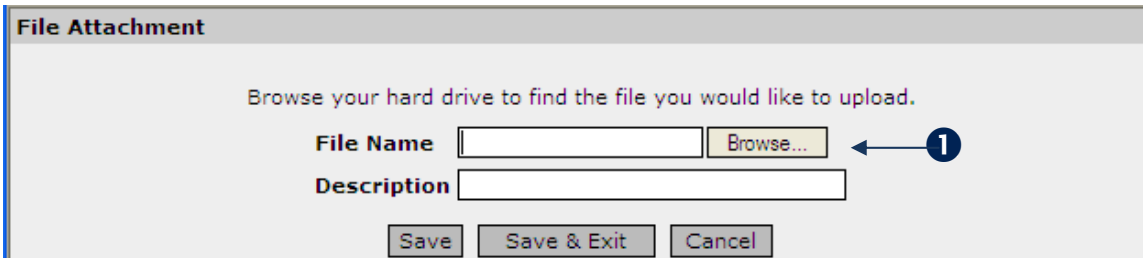
- Click on the **Add New File Attachment** button located on the **Client’s Profile** in **ClientPoint**. (See Figure 2-1 ❶)



Date Added	Name	Description	Type	Provider
01/08/2010	<a href="#">ServicePoint_ReportReviewApp (2).doc</a>	tes	application/msword	Montgomery County Continuum of Care
08/13/2009	<a href="#">AG SHELTER REFERRAL.doc</a>	Test Attachment for Memory	application/msword	Montgomery County Continuum of Care
04/24/2009	<a href="#">Housing Assessment Tool.doc</a>		application/msword	Housing Stabilization Services
04/23/2009	<a href="#">FAMILY SHELTER APPLICATION.doc</a>		application/msword	Housing Stabilization Services
04/23/2009	<a href="#">HMIS SHELTER REFERRAL.doc</a>		application/msword	Housing Stabilization Services
04/23/2009	<a href="#">NEW SP psychosocial.doc</a>		application/msword	Housing Stabilization Services

Figure 2-1

- A new window will display. (See Figure 2-2)



Browse your hard drive to find the file you would like to upload.

File Name   ❶

Description

Figure 2-2

- Click on the **Browse** ❶ button to browse your computer for the file to upload to the **Client’s** record in **ServicePoint**.

- Choose your file and click **Open**. (See Figure 2-3 ①)

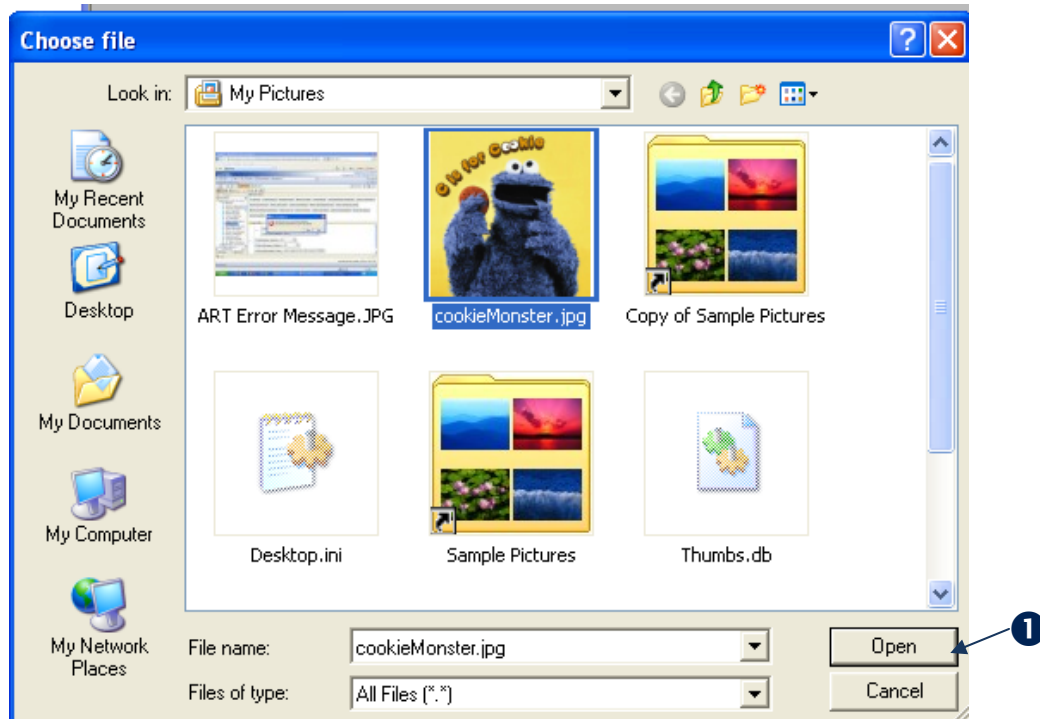


Figure 2-3

- The Choose File window will close, and the file will be listed in the File Name field. (See Figure 2-4 ①)

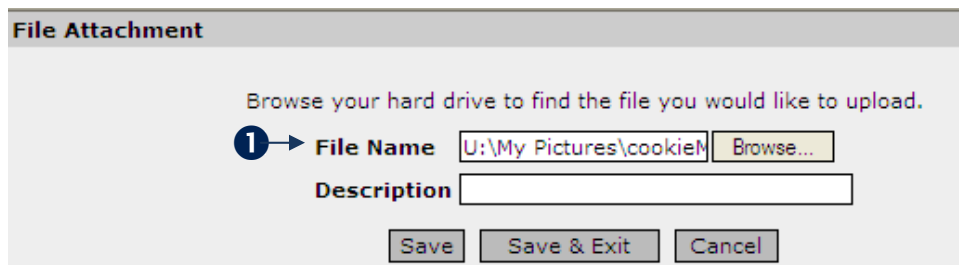


Figure 2-4

- Give your file a Description (optional) and click **Save & Exit**. (See Figure 2-5 ①)

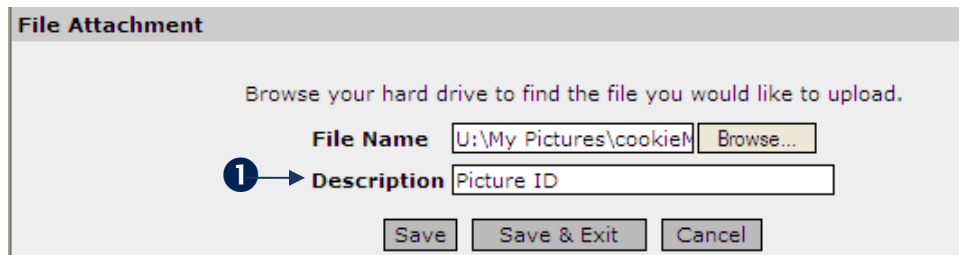


Figure 2-5

- You will now see your file attachment listed. (See Figure 2-6 ①)








File Attachments					
Add New File Attachment					
Date Added	Name	Description	Type	Provider	
07/13/2010	<a href="#">cookieMonster.jpg</a>	Picture ID	image/jpeg	Montgomery County Continuum of Care	
01/08/2010	<a href="#">ServicePoint_ReportReviewApp (2).doc</a>	tes	application/msword	Montgomery County Continuum of Care	
08/13/2009	<a href="#">AG SHELTER REFERRAL.doc</a>	Test Attachment for Memory	application/msword	Montgomery County Continuum of Care	
04/24/2009	<a href="#">Housing_Assessment_Tool.doc</a>		application/msword	Housing Stabilization Services	
04/23/2009	<a href="#">FAMILY SHELTER APPLICATION.doc</a>		application/msword	Housing Stabilization Services	
04/23/2009	<a href="#">HMIS SHELTER REFERRAL.doc</a>		application/msword	Housing Stabilization Services	
04/23/2009	<a href="#">NEW_SP_psychosocial.doc</a>		application/msword	Housing Stabilization Services	

Figure 2-6

## MODIFYING AND DELETING ATTACHMENTS

- Click on the blue hyperlink of the name of the file you wish to modify. This will be located under the **File Attachment** section in **ClientPoint**. (See Figure 3-1 ①)



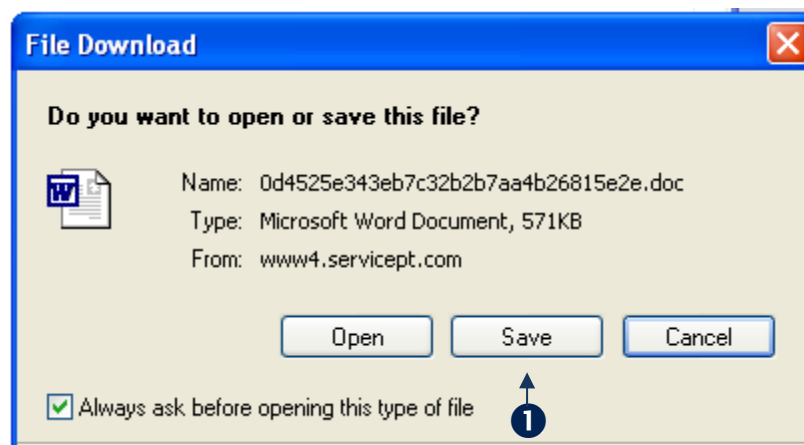
File Attachments					
Add New File Attachment					
Date Added	Name	Description	Type	Provider	
07/13/2010	<a href="#">housing_assessment_tool.doc</a> ①	Housing Assessment Tool	application/msword	Montgomery County Continuum of Care	
07/13/2010	<a href="#">cookieMonster.jpg</a>	Picture ID	image/jpeg	Montgomery County Continuum of Care	

Figure 3-1

- A pop-up window will display asking you if you want to **Open**, **Save**, or **Cancel**. Select **Save**. (See Figure 3-2 ①)



### IMPORTANT

If you do not get a pop up window, the document will not be able to be saved correctly. If you select “Open”, it will open in the Browser and any changes will not be saved.

- A new window will display. Rename your file<sup>1</sup> and click **Save**<sup>2</sup> to save it to a location on your computer. (See Figure 3-3)

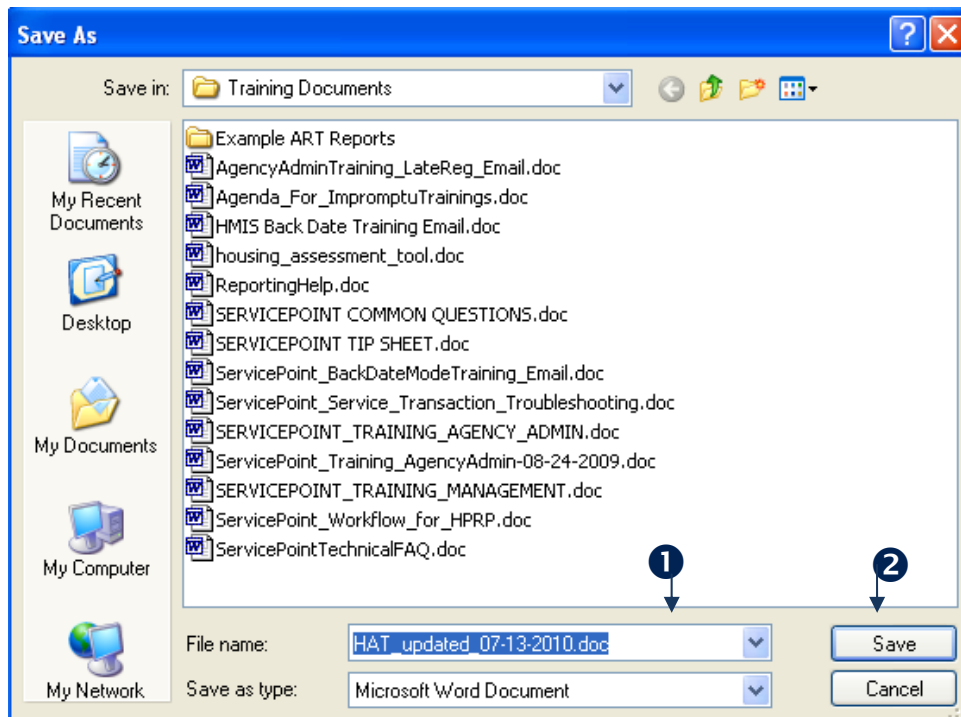


Figure 3-3

### IMPORTANT

Remember where you saved your file as you will need to upload it back onto ServicePoint.

- Once the file is finished downloading to your computer, click on the **Open** button. (See Figure 3-4 ❶)

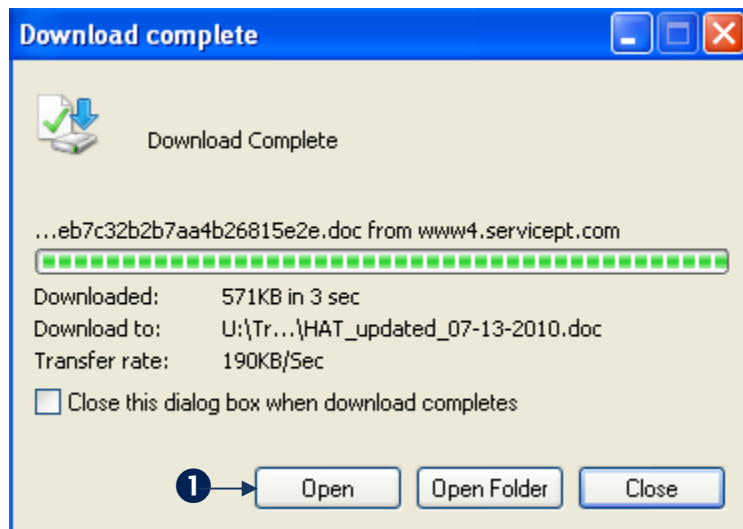


Figure 3-4

- After clicking **Open**, the file will open on your local computer and you will be able to successfully edit and save the document. At this point the file is saved on your computer and not on **ServicePoint**.
- After making your edits, you need to upload the new version onto the **Client** record in **ServicePoint**, and delete the older file.
- Follow the steps mentioned in “**Adding Attachments**” to add the updated file to **ServicePoint**.
- Once your updated file has been successfully attached to the record, click on the trashcan icon of the old file you wish to delete. (See Figure 3-5 ❶)

File Attachments					
Add New File Attachment					
	Date Added	Name	Description	Type	Provider
❶	07/13/2010	<a href="#">HAT_updated_07-13-2010.doc</a>	Updating Housing Assessment Tool	application/msword	Montgomery County Continuum of Care
	07/13/2010	<a href="#">housing_assessment_tool.doc</a>	Housing Assessment Tool	application/msword	Montgomery County Continuum of Care
	07/13/2010	<a href="#">cookieMonster.jpg</a>	Picture ID	image/jpeg	Montgomery County Continuum of Care

Figure 3-5

- A warning window displays. Click the **OK** button. (See Figure 3-6 ❶)

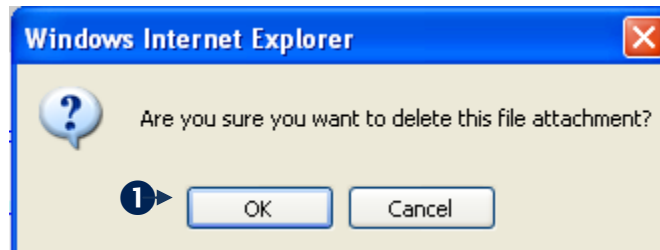


Figure 3-6

- The file will be removed from the **Client** record. (See Figure 3-7)





File Attachments					Add New File Attachment	
Date Added	Name	Description	Type	Provider		
07/13/2010	<a href="#">HAT_updated_07-13-2010.doc</a>	Updating Housing Assessment Tool	application/msword	Montgomery County Continuum of Care		
07/13/2010	<a href="#">cookieMonster.jpg</a>	Picture ID	image/pjpeg	Montgomery County Continuum of Care		

Figure 3-7

- You have successfully updated an attachment in ServicePoint.

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